



Formation Communication Plan

TABLE OF CONTENTS

SUMMARY OF COMMUNICATION SITUATION	2
COMMUNICATION PLAN SCOPE	4
GOALS	5
STRATEGIES	6
STAKEHOLDERS	7
KEY MESSAGES	8
CHART: LEADER ROLES, RESPONSIBILITIES AND CONTENT TYPES	10
RISKS AND MITIGATION STRATEGIES	11
TACTICS AND COMMUNICATION CHANNELS	12
DELIVERABLES	13
SWOT ANALYSIS	15
RESULTS OF COMMUNICATION SURVEY	16
APPENDIX A: Task/Timing RACI Chart	17
APPENDIX B: RACI - Accountability Roadmap	18
APPENDIX C: Sample Deliverable Template	19
APPENDIX D: Sample Stakeholder Analysis Chart	20

SUMMARY OF COMMUNICATION SITUATION

CommonSpirit Health is implementing a formation strategic vision that entails a shift in approach and philosophy. The formation plan for the system was approved by the Executive Leadership Team and Board of Stewardship Trustees in 2021 and is articulated in the *Formation Guide* and the *Formation Strategic Vision 2021-2025*. This shift in the formation philosophy, approach and vision at CommonSpirit now needs to be communicated with increased clarity and consistency.

This new approach intends to:

- A. *Integrate formation into day-to-day work* settings.
- B. Make formation experiences available and *accessible to all* employees.
- C. Provide resources, training and systematic processes that *empower and equip leaders* to facilitate formation experiences with their teams.

Communication is vital, especially during times of change. Current formation communication efforts have focused on one-on-one meetings with division and national mission leaders in combination with short presentations at the National Mission Group (NMG) and the Mission Leadership Council (MLC). While these efforts have set an important foundation, a more comprehensive communication strategy is needed.

Tom Kopfensteiner, Chief Mission Officer, is the executive sponsor for mission and formation. Comprehensive formation efforts and strategy are led by Kyle Kosterman, System Vice President, Mission & Formation.

As of September 2021:

- The formation strategy was approved by the board of stewardship trustees and the executive leadership team.
- A “concept mapping” process is underway and will identify formation outcomes based on input from diverse stakeholders.
- An internally-focused formation website is in development and will be tested with division mission leaders in October 2021.
- Sacred Stories is a formation initiative and has had over 34,000 pageviews since the site’s relaunch last summer.
- A talent acquisition formation pilot launched in the fall of 2020.
- An executive formation online cohort was offered by the System Vice President of Mission and Formation earlier this year.
- Two new formation team members start in October and will focus on large-scale initiatives and initial formation for leaders.

Communication Preference Survey for Mission Leaders

- Input has been collected from a survey of all mission leaders at CommonSpirit to determine their communication preferences.
- Insight from this survey was employed to refine the communication approach, strategy and tools.

COMMUNICATION PLAN SCOPE

IN SCOPE:

The scope of this communication plan is focused on supporting the adoption of the new formation philosophy, approach, and strategy. This plan will set the stage for communicating corresponding initiatives, resources and efforts for fiscal year 2022.

This will be accomplished through:

1. Building broad awareness of formation priorities amongst mission leaders throughout the organization.
2. Assessing communication channel effectiveness through measurement processes established by the formation team's communication tools. (Note: Periodic data and evaluations will be leveraged to modify communication methods and plans as needed.)
3. Providing the system formation team with communication tools and processes to meet goals and launch future initiatives.

OUT OF SCOPE:

While this communication plan does not address some planned formation initiatives, it provides the tools to identify and refine communication plans for future formation priorities.

GOALS

1. **Build broad awareness and buy-in** regarding the shift in formation priorities (e.g., the new approach, efforts, and initiatives) amongst mission leaders throughout CommonSpirit by explaining the “why” behind the shift in focus.
2. **Provide and make accessible formation resources** for mission leaders.
3. **Provide clear direction for mission leaders** to begin utilizing the resources on the online formation site.
4. **Prioritize the integration of formation’s body of work with other system efforts** by aligning mission and formation priorities.
5. **Deliver actionable communication to mission leaders** that is clear and effective. This includes, but is not limited to, understanding various formation initiatives and timing of key events (calendar) with regard to the expectations of a mission leader’s role in formation efforts.
6. **Prepare mission leaders for their respective formation roles and responsibilities** for the upcoming fiscal years’ formation initiatives. This includes their role in shaping a division-specific implementation plan that aligns and advances the national formation vision.
7. **Assess communication effectiveness** through measurement processes and communication tools.

STRATEGIES

1. **Produce and distribute an e-newsletter** for mission leaders. Content will include but is not limited to information about new resources, best practices, and a snapshot of the system formation team.
2. **Update and provide a formation calendar** of key dates and milestones.
3. **Engage the National Mission Group (NMG) and the Mission Leadership Council (MLC)** through regular meeting attendance and presentations.
4. **Provide leaders with meaningful and relevant information** via an accessible and searchable online resource bank to advance formation's vision.
5. **Effectively engage mission leaders by leveraging communication preferences.** Socialize the formation communication plan with mission leaders to obtain feedback and buy-in.
6. **Leverage “experiential learning” by including actionable communication and resources** within the e-newsletter and formation site.
7. **Employ effective and meaningful communication channels** (virtual formation leadership meetings, e-newsletters, 1:1 meetings) to engage local mission leadership for next steps, scheduling, and the production and release of resources. Informing, educating, and building awareness for the next layer of mission leaders is a priority.
8. **Connect formation efforts to other initiatives.** To avoid the perception of formation as a siloed “initiative,” continue engaging individuals and departments to advance our mission and shape CommonSpirit's culture.

STAKEHOLDERS

2021 July - December | Initial Stakeholders

1. Executive Leadership Team (ELT), Board of Stewardship Trustees (BOST)
 2. National Mission Group:
 - Tom Kopfensteiner
 - Kyle Klosterman
 - Kevin Murphy
 - Lois Lane
 - Corinne Francis
 - Tom Harshman
 - Becket Gremmels
 - Pablo Bravo
 2. Vice Presidents of Mission Integration (division and market)
 3. Embedded Mission Integration Leaders
 4. Joint Operating Agreement Mission Personnel
 - Communication through 1:1 meetings with the System Vice President of Mission and Formation
-

2022 January - June | Secondary Stakeholders

1. Operational Leaders
 - In pilot division(s) for “Initial Formation”
2. Other National, Division and Operational Leaders

KEY MESSAGES

What do we want mission leaders to...

*Note: the statements in rose require focused communication efforts.

Know?	Believe?	Feel?	Do?	Experience?
<p>Formation is for everyone.</p> <p>It is a process, not a program; it is a journey, not a destination.</p> <p>It strengthens and inspires, benefiting the individual and the organization.</p> <p>Leaders have high-quality, accessible tools and resources that make delivering formation easy and enjoyable.</p> <p>Formation is not only for executives; it can be integrated into our daily work.</p>	<p>Believe this new approach will work.</p> <p>Formation grows out of the organization's mission and values.</p> <p>When I form myself and my team, a stronger departmental culture follows.</p> <p>Every leader can provide formative experiences for their teams.</p> <p>I will be successful when I use the formation resources accessible to me.</p>	<p>Excited to empower and equip leaders to facilitate meaningful and relevant formation experiences.</p> <p>Supported by the system formation team.</p> <p>Proud of our efforts to make formation available and accessible to all.</p> <p>I want to do this work of formation.</p>	<p>Own the new approach and philosophy of formation.</p> <p>Engage with the formation resources (newsletter, 1:1 meetings, etc); invest in their team's formation.</p> <p>Submit formation materials to the formation site.</p> <p>Promote formation's vision with their team/direct reports.</p>	<p>Our role as mission leaders is not diminished but enhanced when empowering others.</p> <p>Observing the multiplication of our mission capability and capacity at every level of the ministry.</p>

What do we want Division Mission Leaders and the National Mission Group to know as of June 30, 2022?

Division/Market/Facility Mission Leaders	National Mission Group
<ul style="list-style-type: none"> ● To understand <i>where to find resources</i> and know <i>how to use and leverage resources</i> ● To understand <i>the formation philosophy</i> and expectations as related to the next fiscal year ● To understand the <i>various formation initiatives and embrace a deliverable (initial formation)</i> for early summer 2022 ● To consistently utilize and direct others to <i>the formation site/online platform</i> for resources. <p>Division Vice Presidents of Mission Integration need to understand they will be responsible for:</p> <ul style="list-style-type: none"> ● Leading formation at ELT/executive meetings ● Leading formation at Board meetings ● Presenting during <i>Initial Formation</i> experiences ● Presenting at <i>Intermediate Formation</i> experiences 	<ul style="list-style-type: none"> ● To know the goals of formation are met. Formation goals have been shared and implemented with appropriate levels of consultation and collaboration. ● To have awareness of the formation team's progress towards the system formation goals on a monthly/quarterly basis. ● To collaborate in those areas/topics where subject matter expertise is needed.

CHART: LEADER ROLES, RESPONSIBILITIES AND CONTENT TYPES

What does “Formation is for Everyone” mean for me?

<p>MISSION LEADERS Equipping Advanced Topics</p>	<ul style="list-style-type: none"> • Equipping and empowering leaders to facilitate formation • Creating formation plans for area/span of responsibility • Providing subject matter facilitation on advanced mission and formation topics • Delivering new leader formation/initial formation • Leading a prayer ritual/service/dedication/feast day 	<p>Mission leaders are responsible for equipping and ensuring SMEs and leaders are providing formation in their arenas</p>
<p>SUBJECT MATTER EXPERTS Integrating Specialized Topics</p>	<ul style="list-style-type: none"> • Training on the Ethical and Religious Directives • Leading a formal discernment process • Specialized integration of history or church relations topics • Applying spiritual care or theological topics 	
<p>ALL MANAGERS/LEADERS Facilitating Intermediate Topics</p>	<ul style="list-style-type: none"> • Leading values-based formation discussions • Integrating mission and heritage with current issues/initiatives • Creating team-specific formation experiences • Prioritizing and ensuring team formation is happening 	
<p>ALL CO-WORKERS Sharing Foundational Topics</p>	<ul style="list-style-type: none"> • Sharing a reflection on our mission, vision, and values • Utilizing a Sacred Story • Opening a meeting with prayer • Utilizing resources from the formation site 	<p>Increasing complexity of formation topics</p>

RISKS AND MITIGATION STRATEGIES

Risks

- There is an assumption that a formation site focused on internal resources could negatively impact traffic to existing mission websites.
- Mission Leaders want to “own” and deliver formation as they are the “experts” with specialized training and education.
- Mission leaders valued previous formation models where a specialized formation team provided the formation planning and experience.
- Division mission leaders and executives appreciate remote retreat experiences away from the typical work environment.
- Mission leaders need to better understand the types of formation content and experiences that leaders /employees can facilitate and lead.

Mitigation Strategies

- Shift the focus to addressing internal *and* external stakeholder needs. Demonstrate collaboration and mutual benefit with the national mission group to arrive at a both/and, win-win solution.
- Help mission leaders understand that their subject matter and equipping expertise will become even more important. Communicate how the influence of mission is multiplied through equipping and empowering.
- Consistent messaging that “formation for everyone” requires a different, more inclusive and integrated approach at all levels of the organization. Emphasize that facilitating formation with ready-to-use resources for leaders can be simple but meaningful.
- Communicate and validate that brief experiences e.g., reflections” and/or “prayers” are formative.
- Travel during a pandemic and the expectation to responsibly steward resources necessitates a localized approach.
- Communicate the option of providing local “retreats.”
- Provide a chart that shows who can facilitate/lead the basic versus more specialized formation content.

TACTICS AND COMMUNICATION CHANNELS

To accomplish the communication strategy, we are testing and socializing communication channels. Specifically, the approach includes:

	A Key Dates Calendar	Attending Meetings	An E-newsletter
Audience	All Mission Personnel	NMG; MLC; 1:1	VPs of Mission Mission Leaders
Timing	Ongoing	Monthly/as needed	Monthly
Benefits	Highlighted in various channels	Consistent engagement Reporting formation value Courtesy heads' up	Documented snapshot for distribution/can be archived
Effectiveness	Highlighted in the e-newsletter and other communications	Are we being well-received and understood at meetings?	Link utilization/ measurement, e.g., forwards, information deployment, etc
Focus	Knowledge/timing of initiatives and resource availability	Informing and cascading Planting seeds	Consistent information and broad access
Details	Informing Educating Expectation setting	High level overview What's on the horizon? Informational updates	Metrics New resource releases Can be shared

DELIVERABLES

1. Formation Communication Plan

- Formation Communication Resource (internal, this document)
- Formation Communication Plan Slide Presentation (external, when needed)

2. E-newsletter Template (content options):

- Message from Formation Team Member
- Formation Leader Profiles
- Calendar/key formation dates
 - Highlight formation efforts in system
 - Formation Site training overview
 - Concept mapping
- Resource highlights
- Data highlights
- Know-Do-Share
- Reference docs
- Feedback survey (regarding the e-newsletter itself)

3. Plan for monthly department meetings: initiative focus (NMG and MLC)

4. Alignment discussions

- Appointments (as needed)
- Talking points (or Know-Do-Share)

5. Evaluation:

- Metrics to define success for communication goals
- Utilize Google Forms to evaluate communication efforts

MILESTONES

Key communications and milestones.

OCTOBER 2021

Milestone 1: Pilot formation site platform with Vice Presidents of Mission Integration

Milestone 2: Launch monthly e-newsletter for all mission personnel

NOVEMBER 2021

Milestone 3: Launch formation calendar of key dates

Milestone 4: Expanded pilot of online resource platform to embedded/facility mission leaders

DECEMBER 2021

Pause Request two pilot divisions for the online resource platform/formation site

JANUARY 2022

Milestone 5: Launch online platform/formation site pilots

SWOT ANALYSIS

Strengths +

Internal

w/in the team or broader mission team

NMG, MLC,

Self-awareness: need to improve communication
 Communication resource capability
 Access to communication channels and key meetings
 Established strategic vision and plan
 Tools and accessible platform

Weaknesses -

“Change” communication frustration
 Disconnects: Lack of awareness with overall plan and what is coming
 Mission leaders may need additional info regarding the new formation strategy
 Coordination, strategic alignment and planning at national mission level
 Reporting structure of mission integration (centralized vs. decentralized cultures)

External

Other depts competing for time

L&OD, DIEBs, Brand, HR, Internal Comm

Opportunities

Demonstrating new and unique communication channels, and existing work to influence others: resource utilization
 Strategic communication deployment: proper channel, right time, right audience
 Effective communication translates to greater exposure and integration of work with other departments

Threats

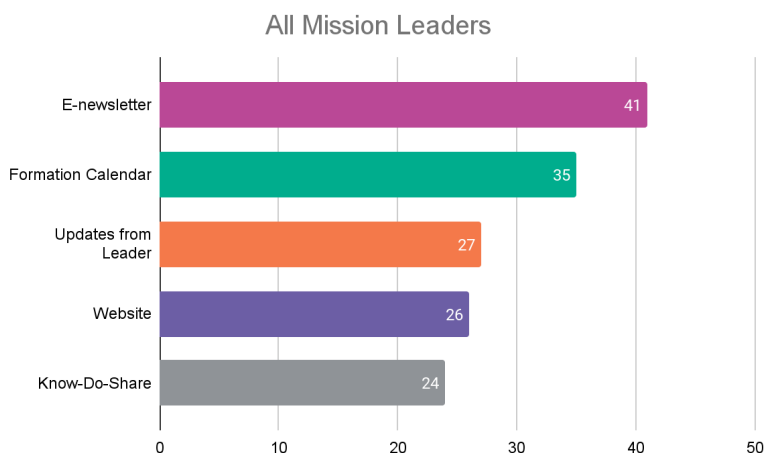
COVID-19 fatigue, current priority overwhelms and challenges embedded and division leaders
 Formation deliverables may threaten groups who have not leveraged the Google ecosystem’s full capability
 Key partners may be hesitant to embrace the tools, platform, and philosophy of equipping, empowering, and decentralizing that is foundational to the formation strategy

RESULTS OF COMMUNICATION SURVEY

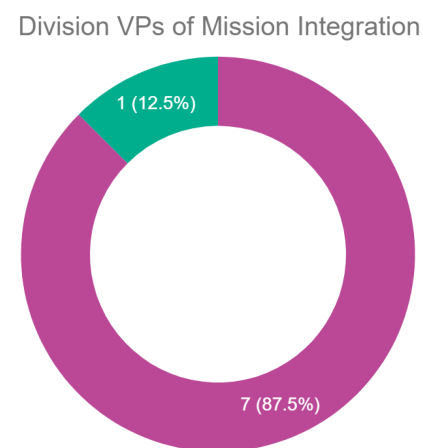
Mission leader communication preferences

94 mission leaders throughout the system were invited to complete a communication survey; 57% responded. As results indicate, there is a strong preference for an e-newsletter and a formation calendar of events. The majority of facility/market mission leaders indicate formation updates should come directly from their division mission leader. Furthermore, the division/market Vice Presidents differ in that they prefer formation communication occurring in existing meetings such as the MLC and NMG meetings.

Prefer these channels:



Prefer existing meeting channels:



APPENDIX A: Task/Timing RACI Chart

Task/timing RACI Chart EXAMPLE

Task	Timing	Responsible	Approve	Consult	Inform
Confirm groups / dates	September	Formation team			Comms team
Set presenter schedule	September	Formation team		Comms team	
Send Invitation	D – 15	Formation team		Meetings and Events	
Confirm presenter	D – 10	Formation team			Comms team
Update deck	D – 5	Comms team		Formation team	
Lead presentation	D – 0	Formation team			
Gather feedback	D +1-5	Comms team			Formation team

APPENDIX B: RACI - Accountability Roadmap

Accountability Roadmap EXAMPLE

- R** Responsible individual(s); owns responsibility for performing/driving work to acceptable result (there can be multiple Rs contributing to a work item/deliverable).
- A** The single person/team Accountable overall to ensure the function is completed (by the R's), performs reviews and approves/signs-off the work item/deliverable as complete.
- C** Might be Consulted; reviews and/or provides advice or recommendations to “R” and/or “A”.
- I** Informed of work item/deliverable progress or completion.

Work Effort	Kyle	Liz	Matt	Carrie	June	Claire
E-newsletter	A	C	R	C	C	I
NMG presentation	A		varies		varies	
MLC presentation	A		varies		varies	
Formation Calendar	A	R	C	I	C	I
DATA of the month	A	C	C	I	R	I
Initial Formation	A	C	C	R	I	R
Concept Mapping	A	R	I	I	C	I

APPENDIX C: Sample Deliverable Template

Communication GENERIC EXAMPLE

Communication GENERIC EXAMPLE	
Description	Quarterly content package for Divisions to reinforce/spotlight content in local communications
Objectives	<ul style="list-style-type: none">● Communication / promotion plan and content● Determine content and priority of focus for each quarter● Design format, speakers?, Q&A?, showcase field● Determine schedule
Structure	<ul style="list-style-type: none">● Content provided at least 30-45 days prior to beginning of quarter to allow ample time for planning● Include: articles, app post, graphics, templates● Leader messaging for featured topics● Talking points for featured topics● Content for social media posting
What Must Happen to Minimize Risks	<ul style="list-style-type: none">● Frequent communication with collaborators to ensure timeliness

APPENDIX D: Sample Stakeholder Analysis Chart

Stakeholder Analysis Chart GENERIC EXAMPLE

Stakeholder	Interests and Concerns	What We Want Them to Know	What We Want Them to Believe	What We Want Them to Do	Communication Channels
<ul style="list-style-type: none"> • Senior Vice Presidents of Operations • Market CEOs/Presidents /COOs • Executives • Directors • Managers 	<ul style="list-style-type: none"> • Why? WIIFM? • When will it happen? • Support for the change throughout the organization • Smooth implementation • My own learning curve • Role and obligation of any of their team members who are involved in project planning and implementation • What can we learn from the experience? • Employee satisfaction • Physician satisfaction 	<ul style="list-style-type: none"> • Details of implementation, timeline, transition • The degree of change will be limited and intuitive • We will implement lessons learned from early go-lives and local user acceptability testing • Helps us achieve our goals • Benefits for them and the organization • Support is available and where to get it • Employee and physician productivity will be enhanced, not suffer 	<ul style="list-style-type: none"> • This benefits them and the organization • Not being done <i>to</i> them but <i>with</i> and <i>for</i> them • This fits with our objectives to improve efficiency and reduce costs • We can do this successfully • It's strategic, thoughtful, and logical • This is better than what we had before 	<ul style="list-style-type: none"> • Take personal responsibility for signing up • Advocate for change • Promote among their teams 	<ul style="list-style-type: none"> • Regular meetings • Market-based e-publications • Market-based intranet sites • Other market-based channels

